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## LESS TENSION AIDS GERMAN FINANCIAL AND TRADE CIRCLES

Important Changes in Economic Situation Lacking, Report.

## INFLATION EXISTS

Mark, Fairly Steady Lately, Embarrasses Importers of Raw Materials.

A certain lessening of tension is noted in German financial and industrial circles, although no important change in the economic situation of the country is apparent, says Commercial Attache-Horring at Berlin in a cable to the Department of Commerce. The feverish activity of industry, as well as the unusual speculation on the stock exchange, which characterized the situation a few weeks ago, has somewhat abated. Industry is experiencing difficulties on account of the shortage of coal and raw materials, and on account of general increased production costs, while a falling off in orders is becoming noticeable.

**Currency Inflation Continues.**  
The German mark has remained fairly stable since December 10, averaging 130 to the dollar. The fluctuation, however, has been sufficient to embarrass the operations of importers of raw materials. The Reichsbank circulation, which amounted to approximately 101,000,000 marks on November 3, has increased to 108,985,550,000 on December 22. The Government Loan Office notes show a check in their long gradual decrease; they amounted to 7,382,200,000 marks on December 22, which was over 600,000,000 more than the figure given at the end of November. The floating debt of the German government, discounted treasury bills, is given as 23,570,000,000 marks for December 20.

New capital issues in December amounted to 2,453,500,000 marks, while capital increases came to 2,689,760,000 marks. This capital was absorbed mainly by the metal and machinery industries, foodstuffs, textiles and banks. The Krupp Works increased their capital from 250,000,000 to 500,000,000 marks. The Alfred Nobel Dynamite Company, of Berlin, has increased its capital from 130,000,000 to 211,000,000 marks, and the Benz Automobile Company from 65,000,000 to 100,000,000 marks. Bankruptcies in December, 150 in number, showed a decrease from the 156 reported for November.

Paul, buying is not so much in evidence in German business circles as during the last two months, and industry shows a quieter and more even tendency than before. The stock market also is less disturbed as the speculative fever seems to have been quieted by the fall in December. The Frankfurt-Zeitungs stock index for January 1, 1922, showed 20.71 against 20.87 on December 1, and 26.55 on December 22. The index of domestic bonds steadily declined.

**Unemployment and Labor Trouble.**  
On December 1 there were about 147,000 unemployed workmen receiving aid from the government, although the actual unemployment figure was considerably higher. Unemployment has increased somewhat since that date. There is some part-time work in the German industries and very little overtime. The more serious labor disputes in December included a lock-out in Berlin of 12,000 men in the building trades, on account of demands for a very large wage increase; a long the lesser strikes was that of the toy-makers in Thuringia. Also in this region a strike of power-house employees left many industries without power for some days.

## Iron and Steel.

The prospect of a renewed demand from the automobile industry enters more largely into the calculations of steel makers. While the first fortnight of the new year has developed no especially significant business in any quarter, early activity was not expected, and results thus far have not been generally disappointing. A slight decline from the December rate of mill operation is noted as the Steel Corporation and independent works, the principal producer averaging about 46 per cent, and price concessions have not wholly disappeared. Published quotations, however, disclose few further revisions, the prevailing condition being one of increasing stability of markets. In all instances, comparisons with the prices of a year ago reveal sharp downward readjustments.

## Hides and Leather.

The bull which recently developed in hide and leather markets continues. Business of magnitude in hides has been lacking since the early part of December, and prices, although nominally unchanged, reflect less firmness. Supplies, however, remain light, with surplus holdings apparently in the form of finished leather, rather than in raw material. The existing quietness in the leather trade is not an unusual condition at this season, and the fact is not obscured that tanners anticipate a revival of demand in the not distant future. With the attention of footwear interests centered on the retailers' convention and style show at Chicago, current buying in that quarter is not extensive, but being mainly confined to pressing requirements. Yet many salesmen will probably start out shortly, and it is believed that the balance of spring orders will soon be placed.

## THE IRON AND STEEL OUTLOOK

Fairly consistent gains have been made in the output of pig iron and steel ingots since last July, when production reached the lowest point in many years. Latest figures show that since midsummer production has nearly doubled, although the present level is still 40 per cent below the 1913 average. Iron and steel exports in recent months have also increased. Even in November, however, which was the best month since last spring, the volume of exports was only about one-half that before the war. Unfilled orders still remain low, although slight improvement was shown last month. Figures in the accompanying table, given in units of 1,000 tons, show the recent progress.

	Pig Iron Outputs	Steel Ingot Outputs	Unfilled Orders	Iron & Steel Exports
Average, 1913.....	2,581	2,608	5,909	236
July, 1921.....	565	803	4,530	87
August.....	864	1,128	4,533	76
September.....	882	1,175	4,561	95
October.....	1,247	1,617	4,283	107
November.....	1,415	1,657	4,231	122
December.....	1,649	1,437	4,268	132

The composite price for various grades of pig iron stood at \$47.83 per ton in September, 1920, according to the Iron Age, but since then it has fallen to the present level of \$19.11. This compares with a 1913 average of \$14.63 per ton. Steel figures in the accompanying table, given in units of 1,000 tons, show the recent progress.

## STEEL OUTPUT MAY GAIN BY SPRING, IS BELIEF

Production of First Quarter of 1922 Probably Will Not Exceed That of the Past Three Months.

**PITTSBURGH, Jan. 15.**—Steel ingot production by the thirty companies that make monthly reports to the American Steel Institute was 1,427,093 gross tons in December, and 16,826,946 tons for the calendar year 1921.

Production of steel ingots by the industry as a whole was at the rate of about 20,000,000 tons a year in December, against a rate of 23,000,000 tons in both October and November, making the rate for the three months about 22,000,000 tons, the highest rate since the preceding February.

Production of steel ingots in 1921 was approximately 15,900,000 tons, against 40,881,332 tons in 1920, 43,619,200 tons in 1917, the record year, and about 30,000,000 tons in both 1912 and 1913. By a margin of 20 per cent, 1921 and 1922 were the two best tonnage years before the war, as the previous record was 25,000,000 tons, in 1910. Thus the 1921 production may be appraised variously according to the viewpoint. From still another viewpoint, the total production of steel ingots from the beginning to January 1, 1921, was about 600,000,000 tons, so that the 1921 production was 2 1/2 per cent of the total amount previously made. The comparison indicates the relative youth of the steel industry, considering that 1921 was regarded as a year of extremely light production.

**Decrease Not Significant.**  
While the December output was measurably lower than the output in either of the two preceding months, the decrease hardly indicates any adverse change in fundamental conditions, but is rather attributable to a temporary slowing down in production caused by the holidays and the desire of customers to have shipments held back until after the inventory date. The production for December was 20,000,000 tons in December and 22,000,000 tons in the December quarter, the prospect is that the March quarter will show a rate of 22,000,000 tons rather than a rate of 20,000,000 tons, and the "unfilled tonnage" should bring a higher rate by March or April.

The Steel Corporation's unfilled tonnage statement for December was 4,268,414 tons. The unfilled obligations at the close of the year amounted to 4,268,414 tons, indicating a negligible increase, 17,872 tons, during December.

**Meaning of "Unfilled Tonnage."**  
The relation between the Steel Corporation's production and shipments and the unfilled tonnage is quite different from that which existed in the early months of 1921. Then the corporation's business lay largely in the making of shipments to holders of the contracts. Of late the unfilled contract business has been largely of the "frozen" character, and the shipments have been largely if not chiefly against absolutely fresh orders entered for prompt shipment. Naturally enough, in such conditions the "unfilled tonnage" does not tend to increase or decrease materially.

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## COMMODITY PRICES.

Somewhat more resistance to the rising tendency of wholesale commodity prices was witnessed last week, 42 advances and 38 declines appearing in the comprehensive list compiled by Dun's Review. A similar comparison of last week's price disclosed 43 increases and 33 reductions, while 62 of the 96 changes in this week of last year were in an upward direction.

Considerable irregularity prevailed in grain markets during the past week, wheat being depressed early by various barish factors and absence of substantial support, while a downward trend also developed in oats and rye. Subsequently, prices recovered on renewed foreign demand. Corn and barley were in good call, with prices well maintained. Strength of quotations was a feature in live hogs, especially in beef and sheep, due to active demand and moderate marketings. In provisions, higher prices reflected the advance in hogs and enlarged consumptive buying. Orderings in excess of requirements weakened prices of butter, while a further sharp decline in eggs resulted from the accumulation of supplies. Cheese, however, developed increased firmness, largely because of the favorable statistical position of the market.

While actual changes in quotations have been few, competition for business continues rather sharp in iron and steel, and price concessions have not entirely disappeared. The minor metals have ruled quiet and steady, as a rule. Firmness is maintained in most divisions of textiles, but the hide market has reflected some easing on limited demand.

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## GREAT ADVANCE SEEN IN EXPORT BUYING OF CORN

Not Sufficient, However, To Offset Seasonal Selling Pressure.

## DEMAND IS HEAVY

Farmers Find It More Profitable to Feed Crop to Hogs And Cattle.

**CHICAGO, Jan. 15.**—Buying of corn for export during the past four months has been heavy, and Russia is expected to absorb some 30,000,000 bushels through the operations of the government's relief committee. The United States could easily export at present 200,000,000 bushels of corn and hardly miss it.

It will take an immense buying of corn by Europe, however, to equal the record exports of 181,405,000 bushels, or 8.6 per cent of the total crop, which were made in 1901. The crop of that year was 2,068,000,000 bushels, about a third less than the present yield, and domestic consumption then amounted to 1,923,697,000 bushels. In 1912, when there was a bumper yield of 3,125,000,000 bushels and the second largest crop ever raised, the exports amounted to only 50,750,000 bushels, and domestic consumption exceeded 3,000,000,000 bushels. The crop of 1921, according to revised figures, is 2,081,000,000, the third largest on record.

**Consumption on Farms Heavy.**  
Consumption of corn on the farms is very heavy at present on account of the low prices, and it is more profitable to feed the grain to hogs and cattle, particularly the latter, than to market it through the regular commercial channels. Many farmers claim a substantial profit from feeding operations.

Buying of corn for export in the first two days of this week amounted to 1,200,000 bushels, but this was without effect on market futures. Bids on cash corn relative to the May future advanced, meanwhile 1 1/2 cents per bushel. Light speculative trading is responsible for the abnormalness of the market in not responding to export buying.

**"Calendar" Selling Pressure.**  
About twenty years ago E. A. Driver, a large grain operator, made the discovery that usually around January 10 the prices of grain softened under liberal marketing by farmers and a slackening of the export trade, thus making it safe to operate on the short side. He followed out this discovery by selling grain early in January and around the middle of September and accumulated a considerable fortune.

A few traders made memoranda of the dates when it was time to buy or sell grain and have handed them around to the trade for the past twenty years. They are still regarded as almost infallible. On January 9 and 10 all markets were subjected to increased selling pressure, and the price of wheat and corn declined. There were also other conditions to make a decline without the "calendar" selling pressure, as the trade terms it. Outside of this, however, the market is falling off in general trade made markets susceptible to weakness with any increased selling pressure. The latter offset the effect of all bullish conditions, such as light export trade, weak wheat premiums, and a fair milling trade.

**FAILURES LAST WEEK.**  
A sharp increase appeared in failures in the United States last week, defaults numbering 719. This compared with 540 insolvencies the previous week, but some part of the difference in number is due to the fact that the past week's returns include figures for one more business day than was the case the previous week. There is also a large increase over the 514 failures reported to R. G. Dun and Company for six days in this week of 1921.

Of the past week's defaults, 425 involved liabilities of \$5,000 or more in each instance, which is equivalent to 53.1 per cent of the aggregate number. This is a lower ratio than was disclosed the previous week, when there were 333 such insolvencies, or 61.7 per cent of the total. The statement for a year ago showed 256 failures for \$5,000 or more in each case, the ratio consequently being 49.8 per cent.

Numbering 94, defaults in Canada last week compare with 73 the previous week and 44 in this week of 1921. Of last week's insolvencies 46 had an indebtedness of \$5,000 or more in each case, which is 48.9 per cent of the total. The previous week there were 45 similar failures, the ratio being 61.6 per cent.

**BANK CLEARINGS.**  
Reversing the tendency of many previous weeks, bank clearings disclosed a slight gain last week, as compared with those of a year ago. Thus aggregate clearings of \$6,682,006,000 at nineteen cities in the United States, as reported to Dun's Review, represent an increase of 0.1 per cent over the total of this week of 1921, although being 19.6 per cent below the figures for 1920. The centers outside of New York City which are included in the statement report a loss of 4.9 per cent last week from the clearings of a year ago and a reduction of 20.6 per cent from those of 1920, but Cleveland is the only city showing a decrease of 30 per cent or more from last year's total. At Boston, Baltimore, Dallas, Detroit, Los Angeles, San Francisco and Seattle, more or less gain is revealed. An increase of 3.1 per cent in New York City's clearings for the week is contrasted with a falling off of 19.9 per cent from the figures for 1920.

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